


Use Excel to Quickly Prepare Data for QuickBooks

Jeff Lenning CPA CITP
Microsoft Certified Trainer




Jeff Lenning CPA CITP
Excel University



Overview

- **Get & Transform** - built-in to Excel 2016 for Windows
 - Formerly available as the Power Query Add-in
- **Get** - retrieve data from variety of sources
 - Database, Excel tables, csv files, web services, etc
- **Transform** - prepare data for use
 - Flatten, split, combine, format, unpivot, sort, filter
- **Work along** - excel-university.com/right

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Contents

- Flatten
- Split & Combine Columns
- Format
- Other Transformations

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Flatten

Name	Account	TransID	Amount
Bayshore Water	Fuel	20002	24.00
		20003	24.50
		20004	25.00
	Utilities	20005	38.75
Cal Gas & Electric	Office expenses	20006	150.22
		20007	122.51
		20008	113.89
		20009	118.50

↓

Name	Account	TransID	Amount
Bayshore Water	Fuel	20002	24.00
Bayshore Water	Fuel	20003	24.50
Bayshore Water	Fuel	20004	25.00
Bayshore Water	Utilities	20005	38.75
Cal Gas & Electric	Office expenses	20006	150.22
Cal Gas & Electric	Office expenses	20007	122.51
Cal Gas & Electric	Office expenses	20008	113.89
Cal Gas & Electric	Office expenses	20009	118.50

Flatten.xlsx
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Get & Transform: An Alternative to Manually Flattening Data

Since many of Excel's features are designed to work with data stored in a flat, tabular format, we sometimes need to flatten data that is received in other formats. In a previous post, we discussed a manual way to flatten data. In this post, we'll use a Get & Transform Query as an alternative to []

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Split & Combine



Name	Street	City	State	Zip
Mann, Brandon	123 Main Street	Dallas	TX	75212
Cogdell, David	1748 Marshville Road	White Lake	NY	12786
Ahn, Justin	1667 Stroop Hill Road	Atlanta	GA	30303
Guerra, Marguerite	2989 Frum Street	Nashville	TN	37217
Wilson, Willard	450 Pretty View Lane	Windsor	CA	95492
Evans, John	3471 Charla Lane	Dallas	TX	75212

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Get & Transform: An Alternative to Finding the Last Delimiter with Formulas

July 28, 2019 | 10 min reading | Excel, Power Query | Get & Transform: Power Query | 10 comments

Sometimes, our data has multiple delimiters. Finding the first delimiter with formulas has been pretty easy over the years. Finding the final delimiter hasn't been as easy... and now, in this post, we'll use a Get & Transform query to grab the characters after the last delimiter. Objective: Before we jump into the mechanics, let's be clear about [...]

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Format



Name	City	State	Email
MANN, BRANDON	GREENSBORO	NC	BRANDON@GMAIL.COM
Howard, Debra	danbury	CT	Debra@Ymail.Com
Cogdell, David	white lake	ny	DAVID@HOTMAIL.COM
AHN, Justin	Atlanta	GA	Justin@Yahoo.Com
Guerra, marguerite	NASHVILLE	TN	Marguerite@outlook.com
Starr, Willard	WINDSOR	Ca	willard@outlook.com
evans, John	dallas	TX	john@yahoo.com
Regalado, Felicia	New York	NY	FELICIA@GMAIL.COM

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Get & Transform: An Alternative to Reformat Macros

June 18, 2018 | [Referencing](#) | [Excel Features](#) | [Get & Transform: Mako, Power Query, Unpivot](#)



Excel 2016 includes a set of features called Get & Transform. In previous versions of Excel, these capabilities were included in the Power Query Add-in. In this post, we'll see how a Get & Transform Query can be used as an alternative to a VBA macro. Overview Here is the scenario. We export data out of [...]

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Other Transformations

Account	Marketing	Operations	Corporate
Office supplies	689	787	629
Postage	1080	817	653
Telephone	170	1011	765
Trade shows	594	894	386
Travel	1058	492	1013



Account	Department	Amount
Office supplies	Marketing	689
Office supplies	Operations	787
Office supplies	Corporate	629
Postage	Marketing	1080
Postage	Operations	817
Postage	Corporate	653
Telephone	Marketing	170
Telephone	Operations	1011
Telephone	Corporate	765




Other.xlsx
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Unpivot Excel Data

May 28, 2018 | [Referencing](#) | [Excel Features](#) | [Get & Transform: Power Query Query Editor, Unpivot](#)



Excel easily summarizes flat, tabular data. When data is stored in a cross-tab style format instead, Excel users have to spend a bit of time preparing the data for use. There are many ways to accomplish just about any Excel task, but in this post, I'll demonstrate how to quickly unpivot the data. Thanks to Patrick who [...]

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Thank You!

LinkedIn: [linkedin.com/in/jefflenning](https://www.linkedin.com/in/jefflenning)



"We just eliminated 1/3 of our steps!" - Gretchen, California


"A project that used to take a couple of months now takes under a week." - Kristine J.

"I knew there had to be a faster way, but didn't have time to figure it out." - Duane

"Thanks ...your amazing courses have life changing consequences!" - Phil, Virginia

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